Job Aid:
How to Create a Master Blanket Purchase Order (MBPO) from Scratch

This Job Aid shows a Basic Purchasing user how to:
- Create a Master Blanket Purchase Order
- Submit a purchase order (PO) for approval and/or send PO to vendor

Of Special Note:

You must be a Basic Purchasing user with appropriate privileges to the organization that owns the migrated document to perform most of the steps outlined below. Departments use three types of Vendor (Seller) Contracts, and this Job Aid will focus on the first two.

1. **Master Blankets with one vendor** (awarded contractor) and a catalog of line items specific to that vendor. These blankets, often referred to as "**single vendor based**," are ideal for contracts where pricing is fixed and does not require a quote, however these blankets can be "Solicitation Enabled" in order to support issuing bids to get price quotes when desired. This setup requires you to create a separate Master Blanket for each awarded contractor.

2. **Master Blankets with multiple vendors** listed as distributors who fall under one placeholder vendor. These blankets, often referred to as "**multi-vendor based**," can be "Solicitation Enabled" in order to support issuing Bids to get price quotes from the contractors, and then placing orders with the quote winner(s). This setup requires you to create one Master Blanket that would contain all the awarded contractors.

3. **Punchout (G2B Blanket).**
   This catalog type integrates COMMBUYS with a vendor's order management system and online shopping site. Initiation of this type requires OSD approval.

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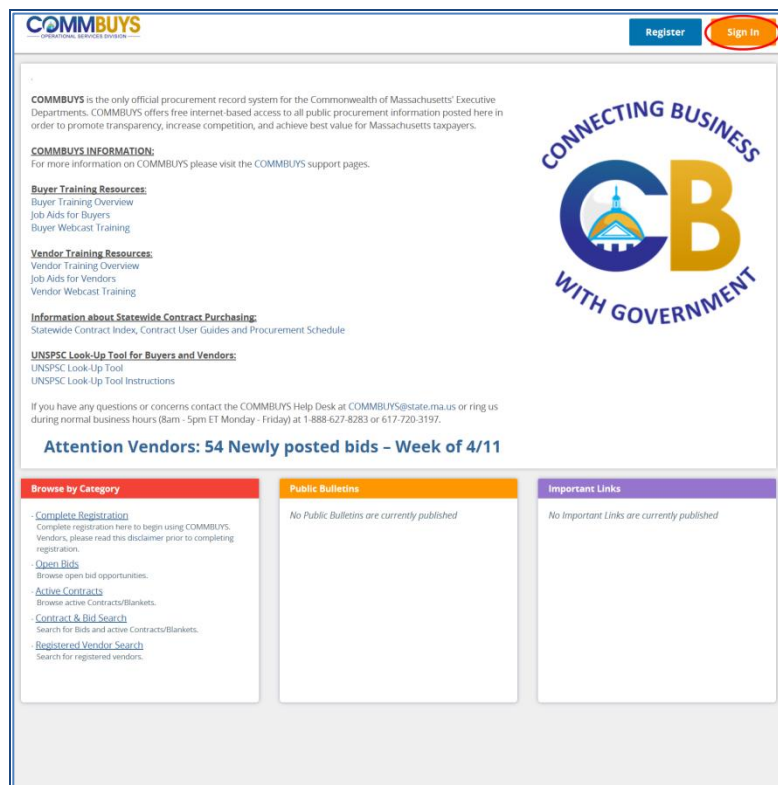
Screenshot	Directions
	Step 1: Accessing the COMMBUYS Landing Page 1. Launch the COMMBUYS website by entering the URL (https://www.commbuys.com) in the browser or by clicking on the hyperlink COMMBUYS. 2. Click on the orange **Sign In** button in the upper right hand corner. 3. Enter your Login ID and Password and click on the **Sign In** button.

Step 2: Creating a New PO

1. Click on the **Add Documents** (plus sign) icon.

2. Select **Contract** from the dropdown menu.
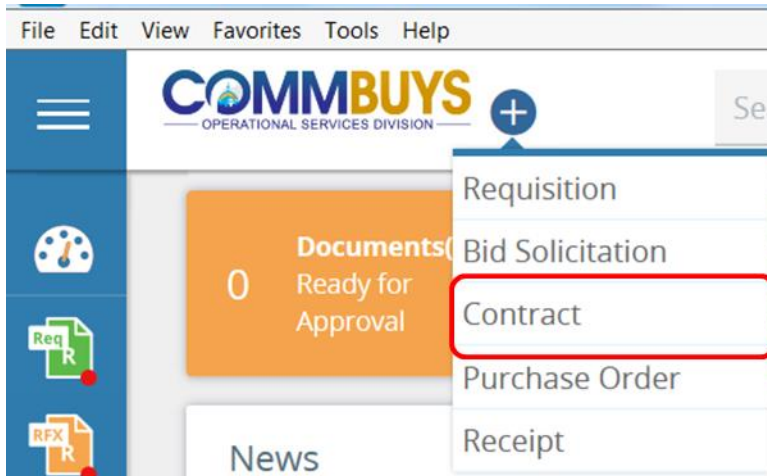
Step 3: Creating a New PO From Scratch

1. From the Create a New Purchase Order screen, ensure that the first radio button: **Create a purchase order from scratch** is selected.

2. Ensure that **Blanket** defaults in the PO Type of the New Purchase Order field.

3. Click on the **Continue** button.
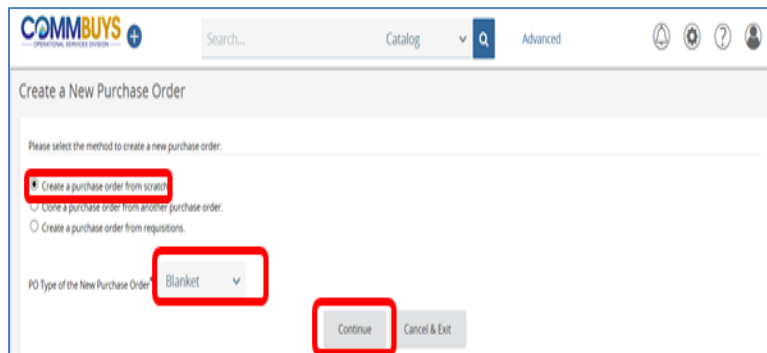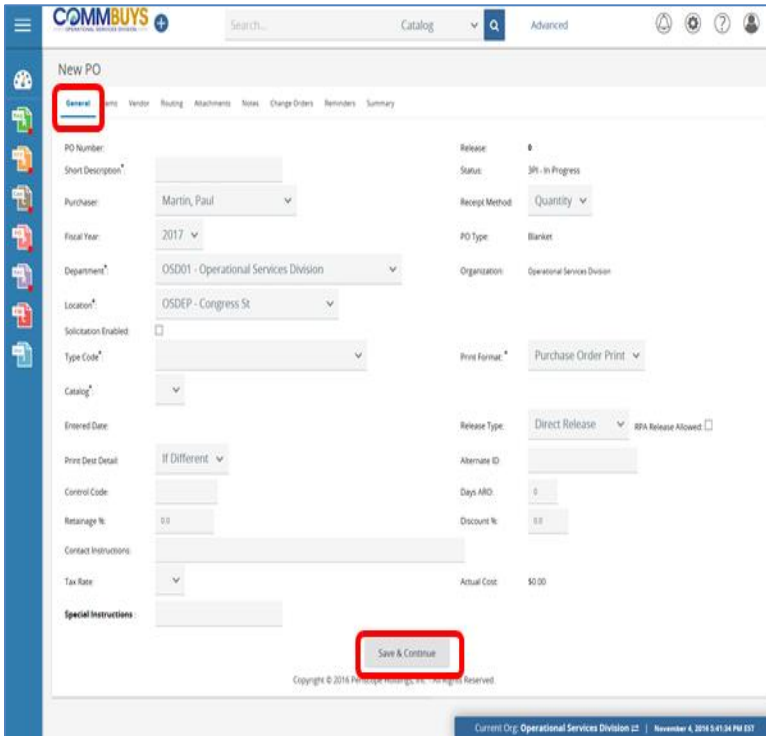
Step 4: Completing the New PO General Tab Screen

The New PO screen opens to the General tab. All fields marked with an asterisk are required. The required fields are:

- **Short Description:** Use this field to enter your agency's contract numbering information, as well as a few key words for easy searching.
- **Department**: This defaults from the user profile. It may be changed using the dropdown if other departments are available to the user.
- **Location**: This defaults from the user profile. It may be changed using the dropdown if other locations are available to the user.
- **Type Code:** Select from the dropdown menu:
  - **CH –** Historical Contract (do not use)
  - **NC –** Non-Statewide/Limited User Contract
  - **SW –** Statewide Contract
- **Catalog:** Field is not used.
- **Print Format:**
  - **Purchase Order Print** (use this default)
  - **PO Vendor Print**

Optional Fields include:
- **Release Type:**
  - **Direct Release:** A single vendor blanket with specific pricing. Select if you would like the PO to be ready to send to the vendor once the requisition is approved.
  - **Standard Release:** Used for any blanket with or without pricing. Select if you would like the PO to require a second approval.
  - **RPA Only Release:** To be used only for situations that require the

immediate acquisition of a commodity or service.

- **Alternate ID:** Enter information as required. This may include (but not limited to) data such as Massachusetts Management Accounting and Reporting System (MMARS) encumbrance ID or Enterprise Resource Planning (ERP)/Accounting system transaction numbers for non-MMARS users.

- **Special Instructions**: Enter information as required. This field allows for entry of specific instruction to vendors. If entered on the requisition, the data in this field will copy forward to the PO and also be visible on the print version of the PO. This may include (but not limited to) data such as shipping drop off info, locations, additional contacts, etc.

When fields are complete, scroll to the bottom of the screen and click on the **Save & Continue** button.

Step 5: Opening the Items Tab

1. Click on the **Items** tab. You are on the General sub tab within the Items tab. The item information section is used to define goods or services, their UNSPSC codes, and pricing information. Blankets are required to have at least one item.

2. Click on the **Add Item** button. Ignore the red validation error as the next few steps demonstrate how to add an orderable item.

Step 6: Adding Items
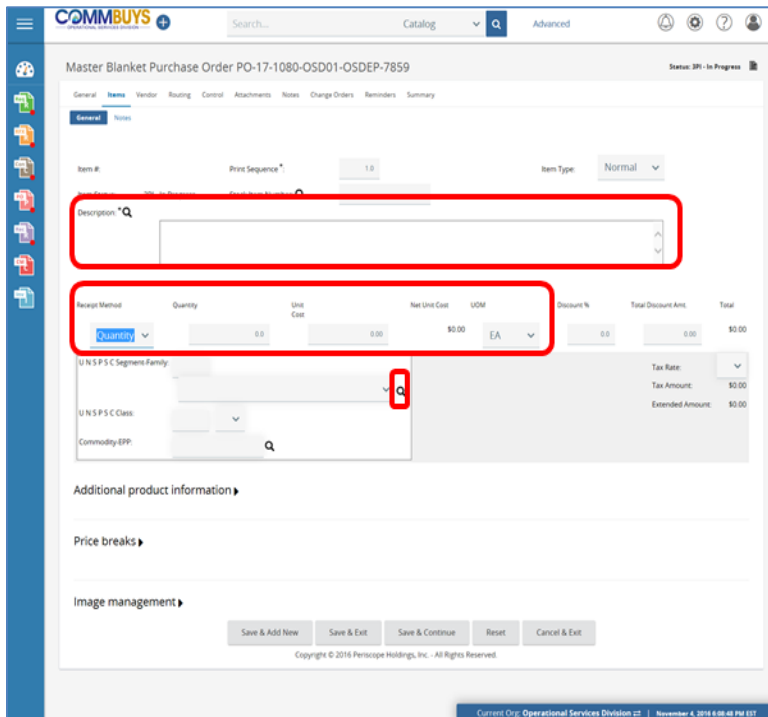
The Items General Tab allows you to enter:

- Description: good/service description; up to 400 characters
- Receipt method: quantity or dollars; choose based on receiving needs for the blanket
- Quantity: (at least 1) make sure it is relevant to the receipt method
- Unit cost: cost associated with the item/service per unit (can leave 0 to allow buyer to enter information)
- UOM (Unit of Measure): choose from dropdown

If this is a multi-vendor blanket, the description should be specific enough to determine what the purchaser is requesting the vendor to provide a quote. It is recommended that you indicate that users should create a Solicitation Enabled requisition when ordering this item.

In a single vendor PO, the item section defines specific products or services, their UNSPSC codes, and pricing information. If pricing varies based on an item attribute, create separate items with distinct pricing.

If you need users to be able to enter quoted prices, leave price blank and instruct them to enter pricing and edit or add to the description on their release requisitions so that the vendor knows what buyers are ordering.

	Step 7: Adding UNSPSC Codes
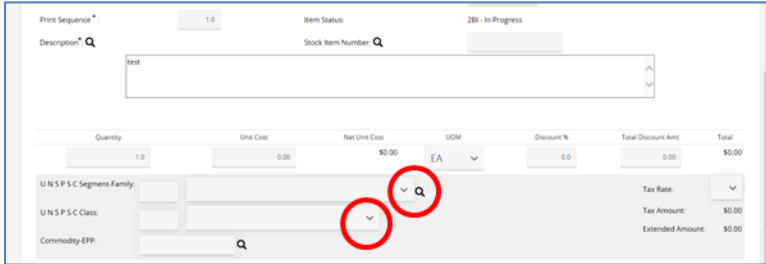
Step 7: Adding UNSPSC Codes

1. Click on the dropdown arrow next to the UNSPSC Segment-Family field.

2. Click on the desired UNSPSC Segment-Family code.

3. The screen refreshes with the cursor in the UNSPSC Class field. Click on the dropdown arrow next to the UNSPSC Class field and the Class results display.

4. Click on the desired UNSPSC Class code.

5. Scroll to the bottom of the screen and click on the **Save & Continue** button.

Step 8: Saving the Items

1. After each item is added to the PO, scroll to the bottom of the page to click on the best option. There are five button options:
   - **Save & Add New** – This button saves the item to the PO and opens a new item entry so that additional items can be added.
   - **Save & Exit** – This button saves the item, closes the item entry page, and returns to the Items tab (general sub tab).
   - **Save & Continue** – This button saves the item and remains on the item entry page.
   - **Reset** – This button removes the item from the PO without saving it.
   - **Cancel & Exit** – This button cancels the item and exits from the item entry page.

Repeat Steps 5 through 7 until the item entry is complete then click the **Save & Exit** button.

Step 9: Reviewing the Items Tab

To edit an item you have already entered, click on the blue hyperlinked number in the Item # column.
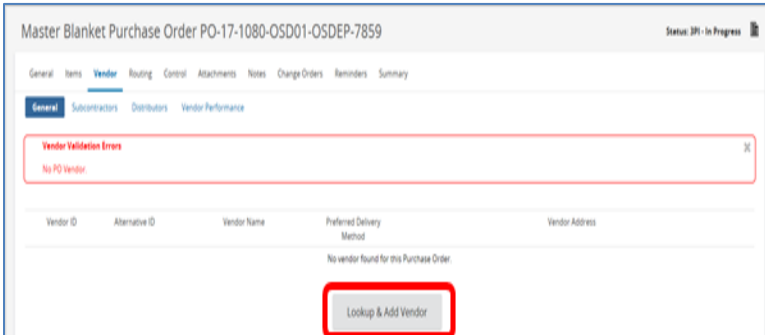
Step 10: Looking Up Vendors

1. Click on the **Vendor** tab.

2. Click on the **Lookup & Add Vendor** button.

Step 11: Entering Vendor Search Criteria

Enter your vendor search criteria if a single vendor is associated with this MBPO.

If there are multiple vendors associated with this MBPO, select the Conversion Vendor (COMMBUYS Vendor ID 99000000) here. The Conversion Vendor acts as an overall placeholder for the contract and allows you to enter all the awarded contractors as distributors.

Step 12: Selecting the Vendor

1. Click the radio button for the desired Vendor (either one single vendor or Conversion Vendor for a multi-vendor contract).

If you do not see the vendor you are looking for, try searching again or contact the vendor to see whether they are registered. The vendor must register with COMMBUYS in order to be added to a blanket.
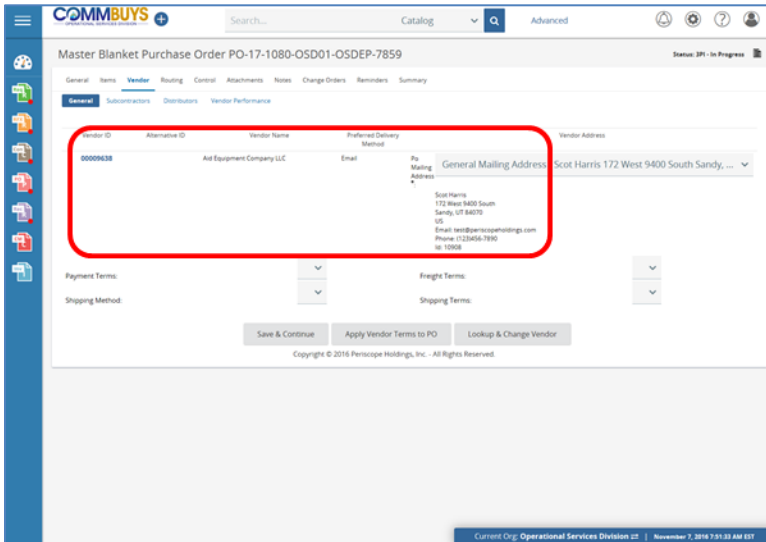
2. Click the **Add Vendor** button

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Step 13: Viewing the Vendor Information

The vendor information now displays on the Vendor tab.

Skip to Step 16 if you have selected a single-vendor MBPO.

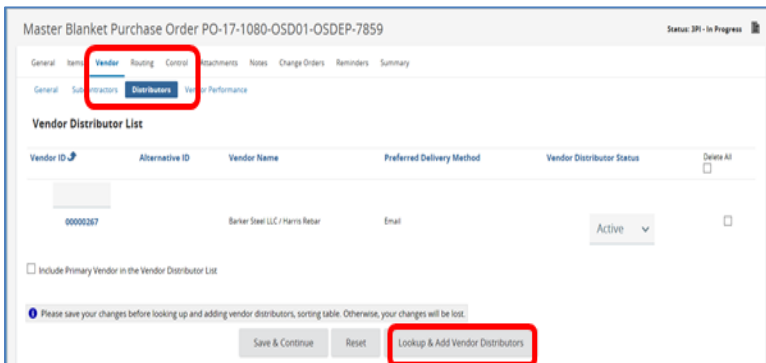If you selected Conversion Vendor for a multi-vendor MBPO, go to Step 14.

Step 14: Searching for Multi-Vendors

1. If you selected Conversion Vendor for a multi-vendor MBPO, click on the **Distributors** sub tab.

2. Click on the **Lookup & Add Vendor Distributors** button.

Step 15: Selecting Multi-Vendors

If this is a distributor-based blanket, another Vendor Search popup window will display.

1. Search for all the Vendors on the contract and check the box next to the Vendor's name. You will need to do this process one vendor at a time.

2. For each vendor added, click on the **Save & Continue** button.

3. When finished adding vendors, click on the **Save & Exit** button.

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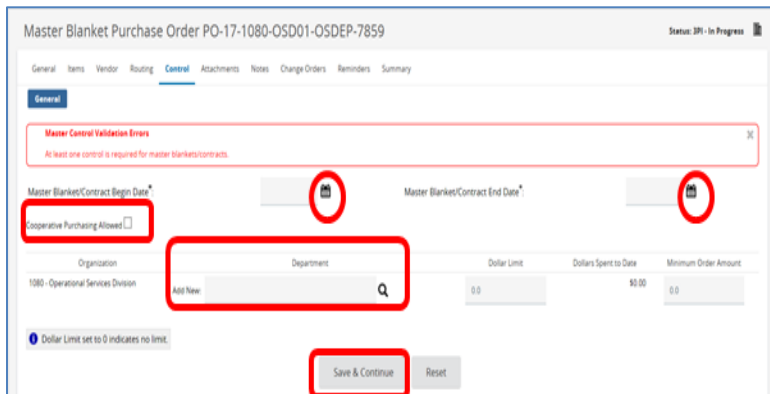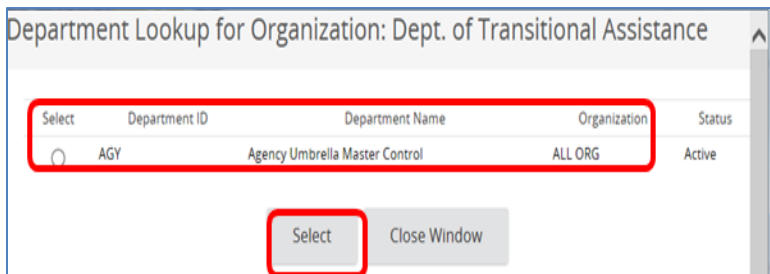

Step 16: Setting MBPO Controls

1. Click on the **Control** tab, enter the **Master Blanket Contract Begin and End Date**. You can use the calendar icons to select the dates.

2. Select the **Organization(s) and Department(s)** who can view and utilize this contract in COMMBUYS.

3. Check the **Cooperative Purchasing Allowed** checkbox if multiple Organizations can view and use this MBPO in accordance with the RFR language.

NOTE: If all organizations in COMMBUYS can purchase from the MBPO, check the Cooperative Purchasing Allowed box and in the organization search, select the radio button for **AGY** (Agency Umbrella Master Control) for all organizations.

If you are the only organization to use this MBPO, select the department(s) by clicking on the **magnifying glass search icon** to search for the organization and department. You will have to select each department if all users in your COMMBUYS organization use this MBPO.

You can also set a dollar limit or minimum order amount if the contract has dollar stipulations.

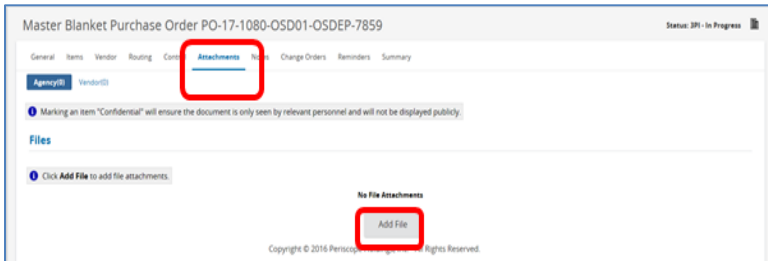4. Click on the **Save & Continue** button.

Step 17: Adding Attachments
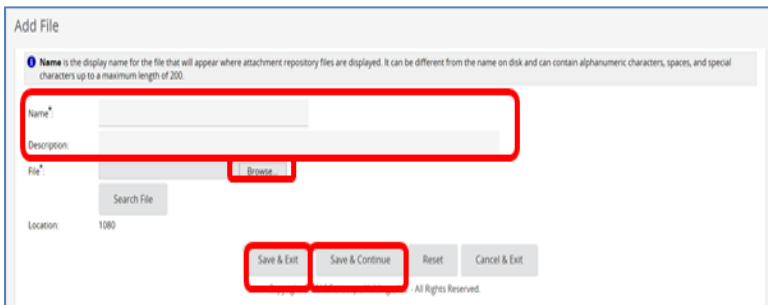
1. Click on the **Attachments** tab.

2. Here you will need to upload all attachments relevant to this MBPO.

3. Click on the **Add File** button.

Step 18: Browsing for Files

1. Click on the **Browse** button to search for files.

2. Select the desired file and click on the **Open** button.

3. The **Name*** field will automatically populate from the name of the selected file, but you can modify it. The contents of this field show up as the underlined link for the file, so you can make the text of the link more descriptive.

4. Provide additional detail in the **Description** field, which becomes visible when a user goes to download the attachment.

5. Add each attachment separately, then click on the **Save & Continue** button.

6. When you have attached all desired files, click on the **Save & Exit** button.

Job Aid:
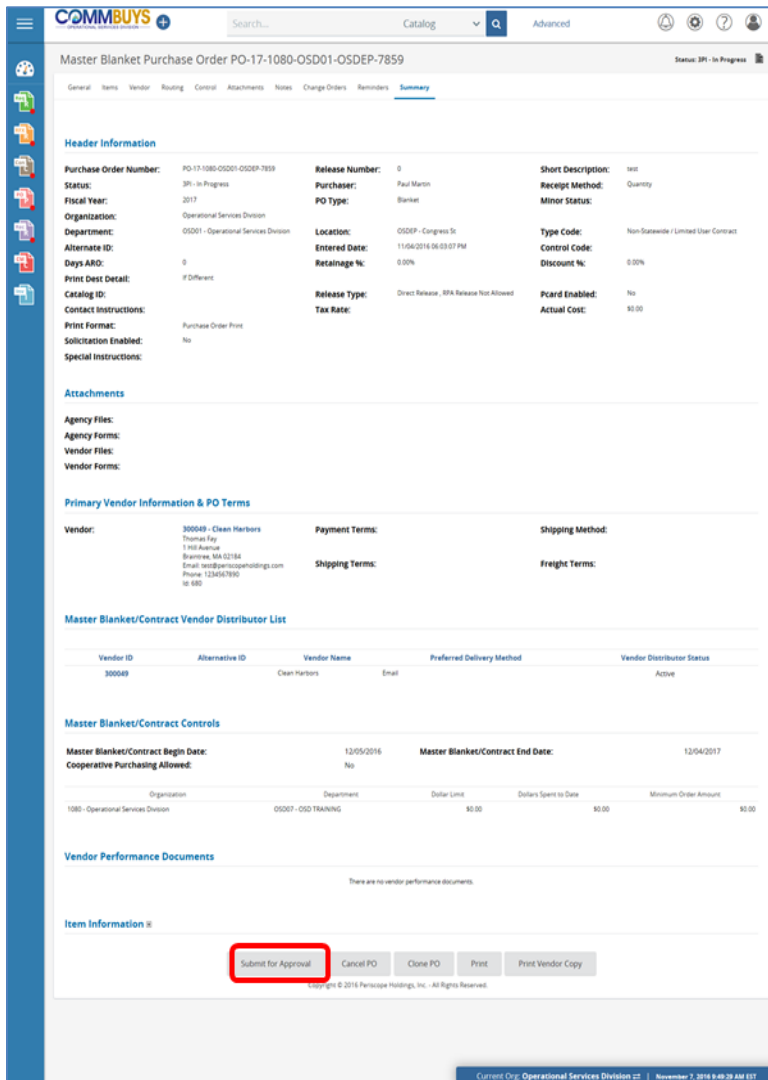## How to Create a Master Blanket Purchase Order (MBPO) from Scratch

Step 19: Reviewing the Summary Tab

1. Click on the **Summary** tab.

2. Review the MBPO content.

The Summary page is broken into headings:
- Header information: general contract information - organization, department, and location; contact instructions, attachments; status. This is also where the appropriate **Type Code** displays to designate the type of contract, and the **Solicitation Enabled** checkbox that determines whether this is a catalog vs. a blanket used for future Bids for pricing not specified in a catalog.
- Attachments: all attached files and templates for the MBPO.
- Primary vendor information & PO Terms: Conversion Vendor holds the place as a primary vendor for the multi-vendor model contracts.
- Master Blanket/Contract Vendor Distributor List: since the vendors are not active COMMBUYS Sellers yet there is no distributor listed.
- Master Blanket/Contract Controls: begin and end date for the contract, as well as who can use the contract.
- Item Information: contract line items/services listed.
- Approval Paths: displays the approvers who are on the approval path for the creation of the MBPO

3. Click on the **Submit for Approval** button. The Blanket PO will be routed through any approvals required and may be returned to you to re-open, edit and resubmit if approvers have disapproved with comments about changes needed.
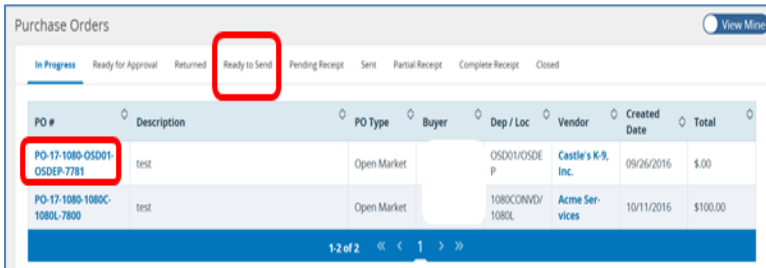
Step 20: Opening the MBPO

Once approvals have been granted, open the MBPO. One way to find the document is by clicking on the **PO** icon on the left side of the COMMBUYS main menu.
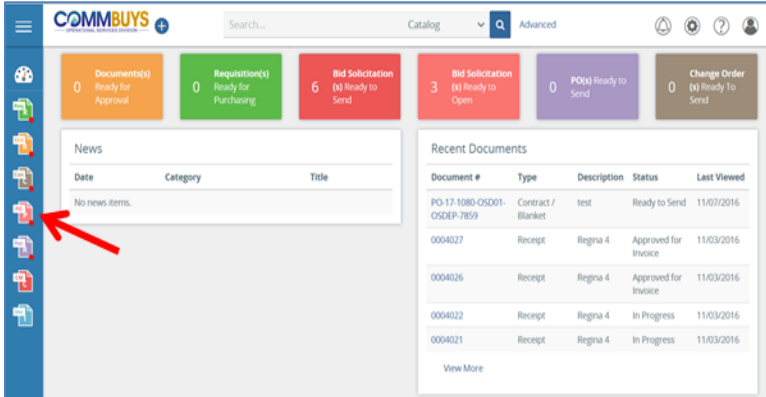
Step 21: Selecting the MBPO

1. Click on the **Ready to Send** tab.
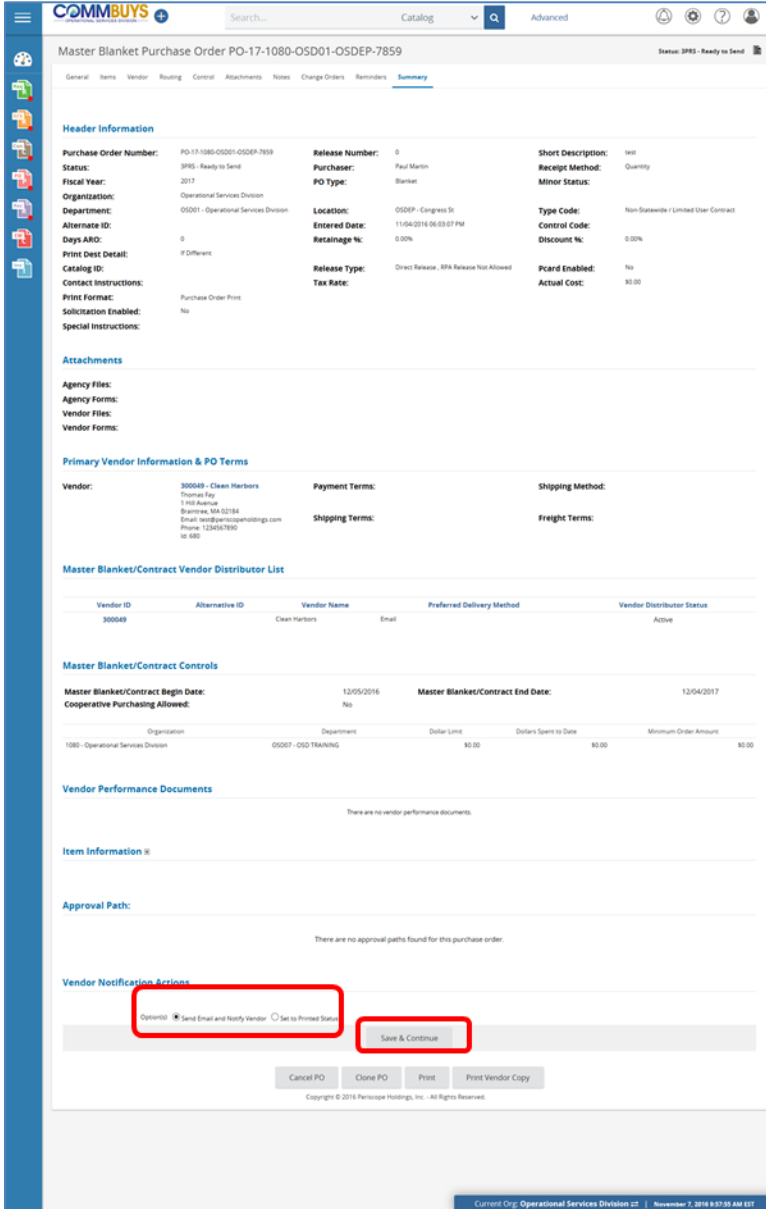
2. Click on the blue hyperlink for the desired MBPO in the **PO#** column.

Step 22: Sending the MBPO

The MBPO opens to the Summary tab page.

1. At the bottom of the page, select one of the following options by clicking on a radio button:
   - **Send Email and Notify Vendor**
   - **Set to Printed Status**

NOTE: Use Send Email and Notify vendor if this is a new contract and the vendor requires notification. Set to Printed Status does not notify the Vendor.

2. Click the **Save & Continue** button. This action places the MBPO into Sent status.